

SPD - Change Management Plan - REF8009

Scope

The purpose of this reference document is to define the format, content and methodology for the Change Management Plan. It is used to define and manage the project's baseline performance measurement thresholds for scope, cost, schedule, risk and quality. The project's performance measurement thresholds will be used in *Change Management – PROC3010/PROC3010* to determine if actual project performance has exceeded the project's baseline performance measurement thresholds. The level of detail of the Change Management Plan is based on the complexity of the project. The Change Management Plan is a supporting plan that facilitates the implementation of the Project Management Plan (PMP). ~~Change Management, Quality Management – REF8008/REF8008], Communications – REF8006/REF8006], Safety and Occupational Health – REF8016/REF8016], and Risk Management – REF8007/REF8007] Plans are developed concurrently in the iterative Program/Project Planning Phase.~~ [Response: rejected – previous BP comments requested that hyperlinks be included for these plans for ease of use.](#)

The Change Management Plan also addresses the use of Change Request Forms and the creation and use of project versions in P3e.

Distribution

Project Delivery Team (PDT)

Ownership

The BP/P2 Configuration Manager is responsible for ensuring that this document is necessary and that it reflects actual practice.

Change Management Plan ~~Content~~ [Response: see reworded master document](#)

~~Format & Content:~~ [Response: see reworded master document](#)

- ~~How will changes~~ [Document how changes will](#) [Response: accepted](#) be managed for the project?.
- Project Baseline Performance Measurements for Scope, Schedule, Cost, Quality, Safety, and Risk
- Use of applicable statutory and regulatory change will be supplemented by project-specific change management criteria.
- Use of Change Request Forms
- Use of Project Versions

Change Management Plan Response: rejected based on formatting consistency

Methodology:

- As processes are completed for *Customer Scope and Requirements Definition – PROC2010[PROC2010]*, *Activity/Schedule Development – PROC2030[PROC2030]*, and *Resource Estimate Development – PROC2040[PROC2040]*, record baseline performance measurement thresholds for scope, quality, risk, schedule, and cost. Other performance measurement thresholds should be considered based on the complexity and specific needs of the project.
- During *Change Management – PROC3010[PROC3010]*, the PM gathers sufficient information to analyze the proposal and potential solutions, considering the impact of changes for all of the project's baseline performance measures in order to insure that all changes are coordinated across the entire project.
- The analysis is distributed to the appropriate decision maker(s), if other than the PM.
- The Project Manager will communicate the decision for all project changes and those that require that the PMP be re-approved to project ~~stakeholders-delivery team~~ Response: PM is part of the PDT. PM is responsible for communicating to outside parties interested in the project (a.k.a. stakeholders). according to the *Communications Plan – REF8006[REF8006]*.

Project Baseline Performance Measurement Thresholds Table

Baseline performance ~~measurements-metrics~~ Response: see reworded master document are defined during *PMP/PgMP Development – PROC2000[PROC2000]*, approved in the *PMP/PgMP Approval – PROC2070[PROC2070]* process, and are updated as required during the project's life cycle.

	Baseline Performance Measurement Thresholds
	<u>Response: Edit Team will review and revise as necessary.</u>
Scope	Defined by WBS; that is developed in Customer Scope and Requirements Definition Process. <u>Note: Addition or deletion of a WBS would break an identified threshold.</u>
Schedule	Defined by scheduled start and finish dates in the project's <u>milestones; critical path that is</u> developed in Activity/Schedule Development Process. <u>Note: Moving critical path project milestones +/- X days would break an identified threshold.</u>
Cost	Defined by resource plan that reflects total project cost of <u>the measurement of actual cost vs the resource estimates; all WBS items. The resource plan is</u> developed in the Resource Estimate Development Process. <u>Note: Variance +/- X dollars or X%.</u>
Quality	Defined by quality objectives; that are developed in the Customer Scope and Requirements Definition, and Project Delivery Acquisition Strategy Processes. <u>Note: Objectives are defined in the Quality Management Plan.</u>

Risk	<u>Identify potential risks; developed are defined</u> in Customer Scope and Requirements Definition, Team Establishment, Activity/Schedule Development, Resource Estimate Development, and Project Delivery Acquisition Strategy processes, as well as Safety and Occupational Health Plan. <u>Note: Quality reduction unacceptable to customer.</u>

Project Version Control

The following table describes P3e project versions that are used to manage the project.

P3e Project Version Table

Project Version Type	Description	When To Use
Baseline	To establish the project's baseline performance measurement thresholds in order to evaluate and measure actual project performance on a periodic bases.	After the PMP is approved in <u>PMP/PgMP Approval – PROC2070/PROC2070/</u>
Rebaseline	Creating another project baseline in order to measure project performance.	Creating another baseline should only be considered when a change to any of the project's performance measurements is of such a magnitude that rebaselining is required to provide relevant data to measure project performance. See <u>PMP/PgMP Approval – PROC2070/PROC2070/</u>
Current	Current versions are created and used to document periodic changes to the project.	“What If” based on current version. See <u>Change Management – PROC3010/PROC3010/</u>
Budget	Budget versions serve programming purposes.	Used when budget or other programming needs occur. See <u>Civil Works Program and Budget Cycle – PROC7000/PROC7000/</u> . Also see <u>Civil Works Program-Specific Information – REF8010/REF8010/</u>
Other ???	Name and description to be determined by PDT or organizational needs.	Used as required to address project-specific needs

Change Request Form

Change Requests can be presented in the form of verbal or informal requests, however, as a best practice proposed changes should be formally recorded in order to facilitate the understanding of the intent of the proposed change. The Change Request Form provides a means of documenting the impact of proposed changes and provides the rationale for approving changes that exceed the

project's baseline performance measurement thresholds. Change Request Forms should be posted to the project in P3e.

Change Request Form

Project:

Date:

Requested by:

Request No.:

Request
Change Description:
Justification:
Narrative Description of Impact:
Scope Impact:
Cost Impact:
Quality Impact:
Schedule Impact:
Risk Impact:

Coordination
Team:

Resolution of Change
<input type="checkbox"/> Approved <input type="checkbox"/> Disapproved
Basis of Action:
PM Signature:
Date:

